

## Position Eligibility Worksheet\*

Employee Name: \_\_\_\_\_ SSN: \_\_\_\_\_

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### Current Position

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Eligibility evaluated \_\_\_\_/\_\_\_\_/\_\_\_\_

Date employee entered position \_\_\_\_/\_\_\_\_/\_\_\_\_

Position title \_\_\_\_\_

Position number (if applicable) \_\_\_\_\_

Is this a new or an existing position?      New ☐      Existing ☐

If existing, position formerly held by: \_\_\_\_\_

1. Does this position ever require work for at least 70 hours per month?

Yes ☐    No ☐    If yes—go to next question  
If no—position not eligible at this time.

2. Does this position require work for at least 5 months of at least 70 hours each month during a 12-month period?

Yes ☐    No ☐    If yes—go to next question  
If no—position not eligible at this time.

3. Is the position established on an ongoing basis (not a project position with an expected termination date)?

Yes ☐    No ☐    If yes—position appears to be eligible  
If no—position may not be eligible

4. Does the employee work in more than one position for you?

Yes ☐    No ☐    If yes, explain: \_\_\_\_\_

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5. Do other employees work in this position?

Yes ☐    No ☐    If yes, explain: \_\_\_\_\_

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6. Is the position considered eligible?

Yes ☐    No ☐

If position is ineligible, give the reason for your determination. \_\_\_\_\_

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\* This worksheet is for PERS Plan 1 and Plan 2; SERS Plan 2 and Plan 3; and TRS Plan 2 and Plan 3.

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## Employee's Understanding of Position Eligibility

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Check the appropriate boxes below:

I understand this position is:

☐ eligible

☐ ineligible

For membership in the Public Employees' Retirement System (PERS)

☐ Plan 1

☐ Plan 2

For membership in the School Employees' Retirement System (PERS)

☐ Plan 2

☐ Plan 3

For membership in the Teachers' Retirement System (TRS)

☐ Plan 2

☐ Plan 3

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Employee's Signature

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Date

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## Eligibility Review

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Employers should review eligibility determinations periodically.

Reviewer			Date Reviewed	
Eligibility has changed	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Comment	

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Reviewer			Date Reviewed	
Eligibility has changed	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Comment	

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Reviewer			Date Reviewed	
Eligibility has changed	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Comment	

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Reviewer			Date Reviewed	
Eligibility has changed	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Comment	

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Reviewer			Date Reviewed	
Eligibility has changed	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Comment	

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